
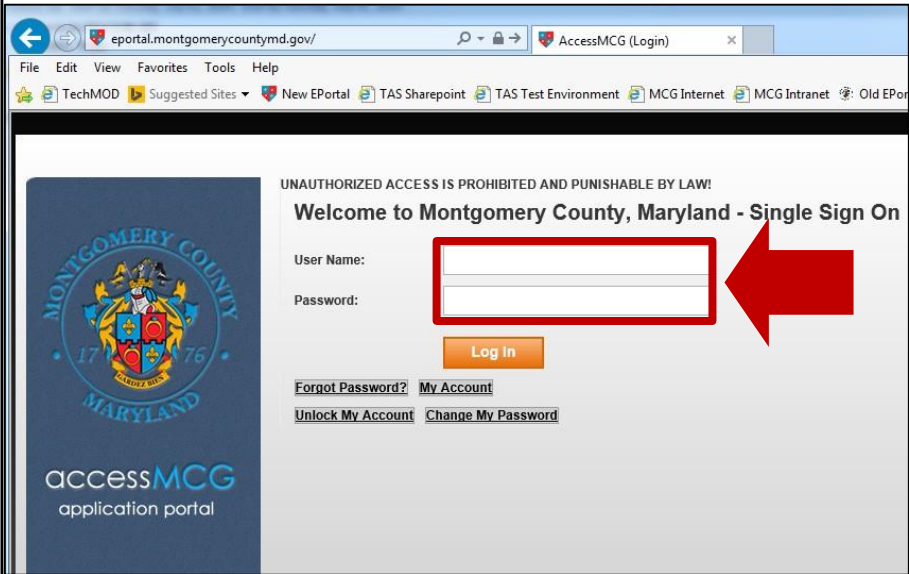

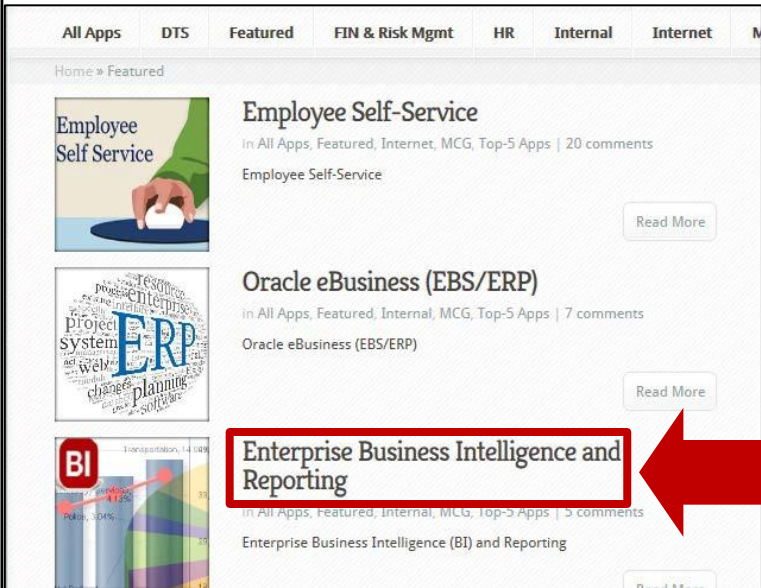


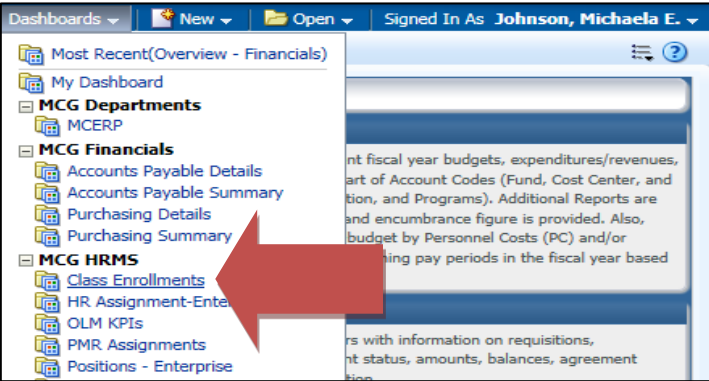


## Viewing and Exporting Data from the OLM Dashboard in BI Tool

Step	Action	
1.	<p>Go to the County Portal: eportal.montgomerycountymd.gov</p> <p>Enter in your username and password.</p> <p>Click the <a href="#">Login</a> Button.</p> <p></p>	
2.	<p>Click on the <a href="#">Enterprise Business Intelligence and Reporting</a> application.</p> <p></p>	

Step	Action	
3.	Click the <b>Go to Enterprise Business Intelligence</b> button.	 <p>The screenshot shows the 'Enterprise Business Intelligence and Reporting' landing page. It features a header with 'in All Apps, Featured, Internal, MCG, Top-5 Apps   5 comments' and an 'Add to favorites' link. A large red arrow points down to a blue button labeled 'Go to Enterprise Business Intelligence'.</p>
4.	Click the on <b>Dashboards</b> drop down menu.	 <p>The screenshot shows the 'MCG Business Intelligence Product Overview' page. The 'Dashboards' dropdown menu in the top navigation bar is highlighted with a red arrow. Below the navigation bar, there are tabs for 'Financials', 'Human Resources/Payroll', and 'MCG Legacy'. The 'Financials' tab is active, showing a 'Summary' section with a 'Purchasing' dashboard and a 'Detail Report' section with a 'General Ledger' dashboard.</p>
5.	Click on <b>Class Enrollments</b> .	 <p>The screenshot shows the 'MCG Business Intelligence Product Overview' page with the 'Dashboards' dropdown menu open. A red arrow points to the 'Class Enrollments' link in the left sidebar. The sidebar also lists other categories like 'MCG Departments', 'MCG Financials', and 'MCG HRMS'.</p>

6. The **Class Enrollment Dashboard** will open.

Three (3) reports were created for HR Liaisons and Training Program Managers.

- Department History
- Mandatory Training Enrollments...
  - For Employees
  - For Managers

Select the Report by clicking on the tab.

Department History

Mandate >>

Class Enrollments

Home Catalog Favorites Dashboards New Open Signed In As Johnson, Michaela E.

Catalog Preparation Class Preparation Department History End of Year Report Employee Training Schedule Enrollments by Class Course Compliance Report Mandate >>

Parent Category Lvl2 --Select Value-- Course Name --Select Value-- Class Name --Select Value-- Class Start Date Between [ ] [ ] Apply Reset

Catalog Preparation Report

Time run: 9/1/2016 8:44:45 AM

Parent Category Lvl1	Parent Category Lvl2	Parent Category Lvl3	Course Name	Professional Credits	Offering Name	Class Name	Class Start Date	Class End Date	Class Time	Class Status	Resource Type	Resource Name
Behavioral Health	HHS - Center for Continuous Learning	MCG Training	ASAM Placement Criteria Course	3.00	ASAM Placement Criteria ILT Offering	ASAM Placement Criteria Class 2014-09-25	09/25/2014	09/25/2014	13:00 - 16:00	Closed	Trainer	Athena Loukides-Morrow, MA, LCPC, Montgomery

7. The **Department History Report Dashboard**.

The parameters are at the top.

Below that you will see the last report ran.

- Notice the information which will be reflected in the report.

Catalog Preparation Class Preparation Department History End of Year Report Employee Training Schedule Enrollments by Class Course Compliance Report Mandate >>

Department OHR Course Name --Select Value-- Class Name --Select Value-- Delivery Mode --Select Value--

Class Start Date Between [ ] [ ]

Enrollment Date for CBT Between [ ] [ ]

Completion Date for CBT Between [ ] [ ]

Apply Reset

Department History Report

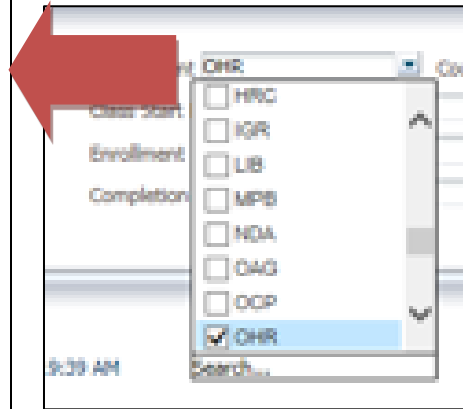
Time run: 9/1/2016 10:19:39 AM

Hr Org	Learner Name	Job	Learner Type	Employee/Party Number	Delivery Mode	Course Name	Class Name	Class Start Date	Class End Date	Enrollment Date	Completion Date	Class Time	Class Status	Enrollment Status
OHR 33 Administrative Services Team	Chohda, Anjoo	Specialist	MCG	1547	Instructor Led Training (Classroom)	A/P & Procurement Year-End Training Course	A/P & Procurement Year-End Training Class 2015-05-07	05/07/2015	05/07/2015	5/21/2015	0/0/0	13:00 - 16:00	Closed	Attended
						Accounts Payable Fundamentals - Non Inquiry Refresher Course	Accounts Payable Fundamentals - Non Inquiry Refresher Class 2015-04-16	04/16/2015	04/16/2015	4/1/2015	0/0/0	09:00 - 15:00	Closed	Attended

### Setting Parameters

#### 1. Select Department

- The report will default to OHR.
- Remove the checkmark from the OHR box.
- Using the scroll bar find and select your Department

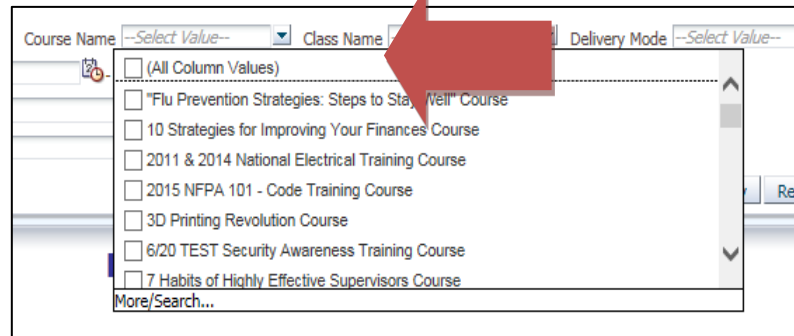


#### 2. Select Class/Course

This will provide a list of everyone in the department who has enrolled in a class.

Use the drop menus to:

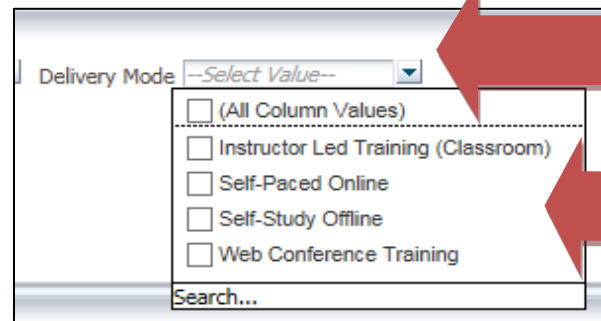
- Select the Course
- Select the Corresponding Class.

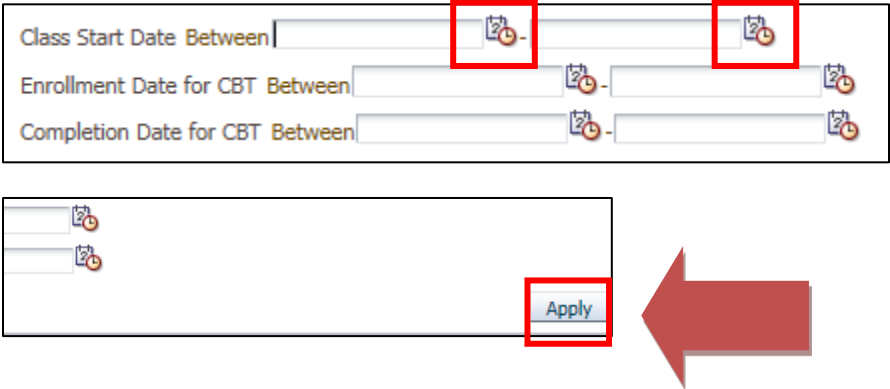


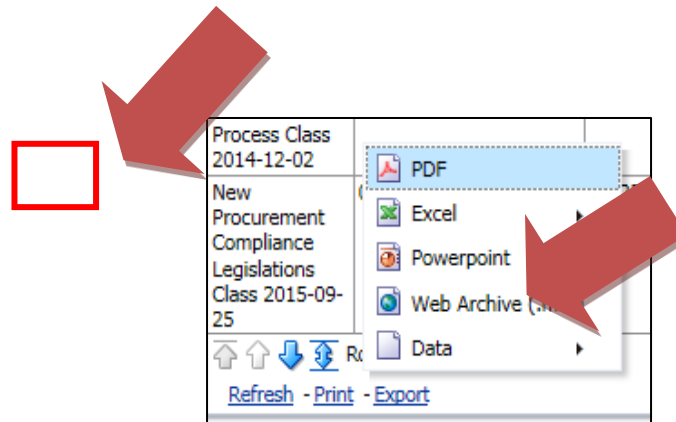
#### 3. Select Delivery Mode

Defines the way the class was presented

- Use the drop down menus
- Select the Method



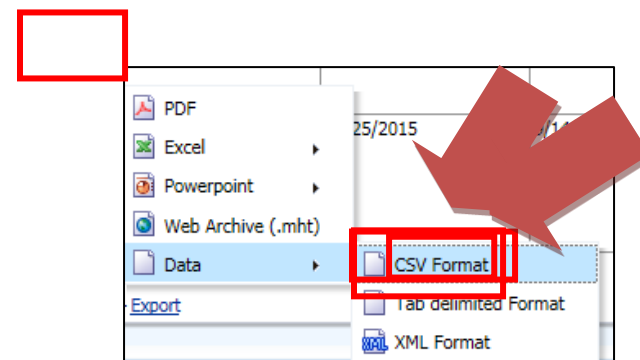
<p>4. Select Time Frame</p> <p>You will usually only use the <i>Class Start Date Between</i> option.</p> <p>Use the scheduling icons to select each date.</p> <p>5. Click Apply</p>	
<p><b>Exporting Report</b></p> <p>6. Scroll down to the bottom of the page</p> <p>7. Click Export</p> <p>The Format Menu will open.</p> <ul style="list-style-type: none"><li>– Click Data</li><li>– Click CSV Format</li></ul> <p>You will be prompted to Save the document.</p> <p>Save it.</p> <p>Change it from a CSV file to an Excel file.</p> <p>In Excel, you can manipulate the data to fit your needs; format the columns, use PivotTables, etc.</p>	



	2014-12-02							
New Procurement Compliance Legislations Class 2015-09-25	New Procurement Compliance Legislations Class 2015-09-25	09/25/2015	09/25/2015	9/14/2015	0/0/0	09:00 - 12:00	Closed	Attended

Rows 1 - 50

Refresh - Print - Export



### The Mandatory Enrollment by Department Reports.

These reports will provide the names of

- All employees, or
- All Managers and Supervisors in your Department and what their enrollment status is for a specific class, ***whether or not they ever enrolled in it.***

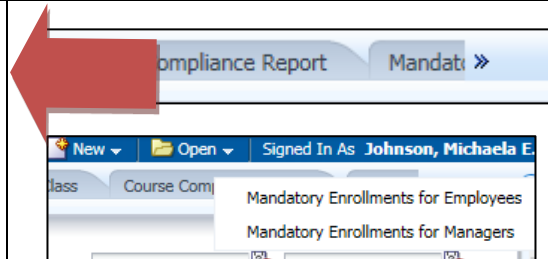
On the Dashboard, the Mandatory Enrollment tabs are on the far right.

1. Click the arrow to see both reports
2. Select the Report.

The parameters are at the top.

Below that you will see the last report ran.

- Notice the information which will be reflected in the report.



Department: OHR Course Name: Preventing Workplace Delivery Mode: --Select Value--

Apply Reset

### Mandatory Enrollment by Department

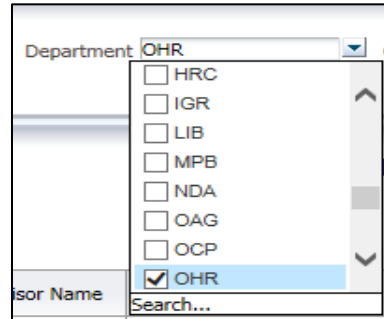
Time run: 9/1/2016 12:15:23 PM

Attendance Status	Learner Name	Supervisor Name	Division	Department	Hire Date	Course Name	Course End Date	Course Completion Date
Not Attended	Fulco, Belinda J.	Plucinski, Karen J.	OHR 33 Health and Employee Welfare Division	OHR	6/19/2000 12:00:00 AM	Preventing Workplace Management Course		

### Setting Parameters

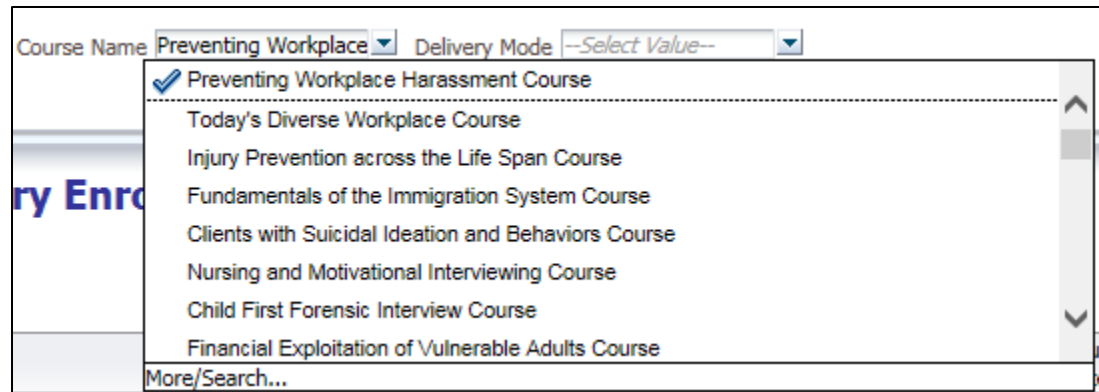
#### 8. Select Department

- The report will default to OHR.
- Remove the checkmark from the OHR box.
- Using the scroll bar find and select your Department



#### 9. Select Course

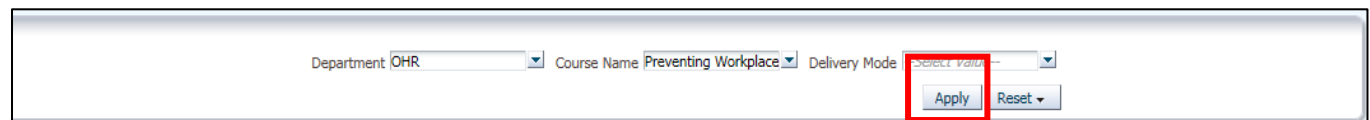
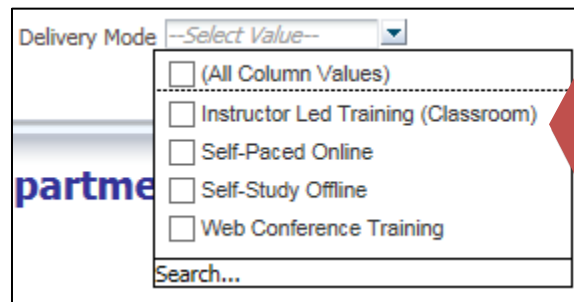
- Use the drop menus to Select the Course.



#### 10. Select Delivery Mode

Defines the way the class was presented

- Use the drop down menus
- Select the Method
- Click Apply





## Exporting Report

11. Scroll down to the bottom of the page

12. Click Export

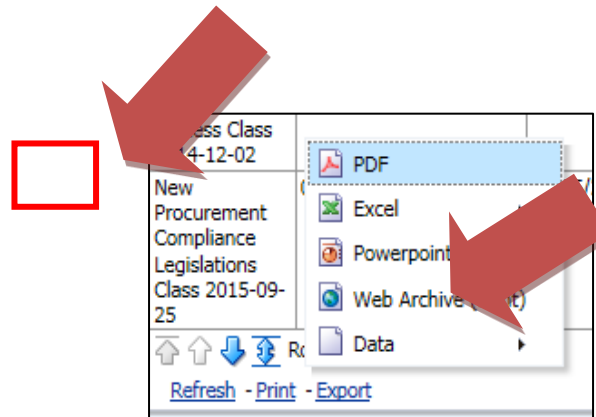
The Format Menu will open.

- Click Data
- Click CSV Format

You will be prompted to Save the document.

Save it.  
Change it from a CSV file to an Excel file.

In Excel, you can manipulate the data to fit your needs; format the columns, use PivotTables, etc.

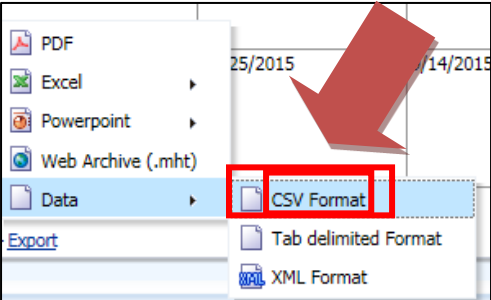


	2014-12-02							
New Procurement Compliance Legislations Course	New Procurement Compliance Legislations Class 2015-09-25	09/25/2015	09/25/2015	9/14/2015	0/0/0	09:00 - 12:00	Closed	Attended

Rows 1 - 50

[Refresh](#) - [Print](#) - [Export](#)



			
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